

# Document Management

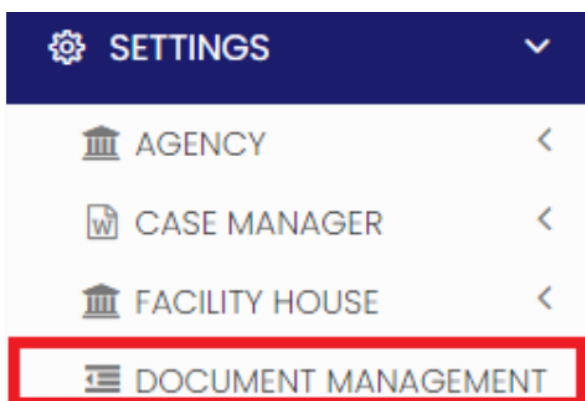
Document management in home health care involves efficiently organizing and storing patient records, treatment plans, and related documents to ensure high-quality care.

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

## Adding New Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Folder, select the User type Referral/ Employee and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#a81b1b

Is Time Based?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	

# Editing Folder

## Settings >> Document Management

Select the Folder from List and click Edit option on the right side of the screen.

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input checked="" type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	auth	No	Yes	

Edit the required information and click Save option.

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based?

No

Attached Template Form

Show To All

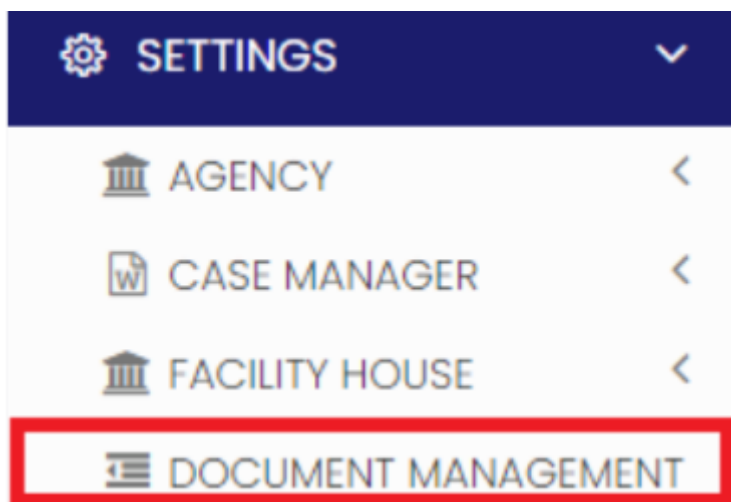
Yes

No

# Adding New Sub-Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Sub-Folder, select the user type Referral/ Employee, select the Folder name in which the sub folder has to be added and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

A screenshot of the 'Edit Document Management' form. The form has a title bar 'DOCUMENT MANAGEMENT' and a subtitle 'Edit Document Management'. It contains several fields: 'User Type\*' (dropdown with 'Referral' selected), 'Assignee\*' (dropdown with 'Clark, Samuel' selected), 'Documentation Type\*' (dropdown with 'Internal' selected), 'Folder / Subfolder\*' (dropdown with 'Subfolder' selected), and 'Folder\*' (dropdown with 'Care Plan' selected). There are also 'Save' and 'Cancel' buttons at the top right. Below these are 'Subsection Name\*' (text input with '2023'), 'Role\*' (dropdown with 'Administrator, Clinical Team, ...'), 'Is Time Based?' (dropdown with 'No'), 'Attached Template Form' (text input), and 'Show To All' (radio buttons for 'Yes' and 'No', with 'No' selected).

# Editing Sub-Folder

**Settings >> Document Management**

Select the Sub-Folder from List and click Edit option on the right side of the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input checked="" type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	

Edit the required information and click Save option.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Select	Search Reset
<input type="checkbox"/>	Referral	Internal		Folder	Care Plan	No	No	
<input type="checkbox"/>	Employee	Internal		Folder	Documents	No	No	
<input type="checkbox"/>	Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	
<input type="checkbox"/>	Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	
<input checked="" type="checkbox"/>	Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	
<input type="checkbox"/>	Employee	Internal		Folder	reports	No	Yes	

# Deleting Folder / Sub-Folder

## Settings >> Document Management

For deleting Folder / Sub-Folder in Document Management screen, select the Folder / Sub-folder from List by using the check box of the Folder / Sub-Folder and click Delete option or Disable Selected option on the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Show To All	Action
<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Referral	Internal		Folder	Care Plan	No	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	Documents	No	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal		Folder	TIMESHEET 2023	Yes	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Plan of Care (485)	Subfolder	2023	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Plan of Care (485)	Subfolder	testing	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal	Incident Report	Subfolder	RR1	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/> Employee	Internal		Folder	reports	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	auth	No	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

# Restore Deleted Folder / Sub-Folder

## Settings >> Document Management

The Deleted folder can be viewed by using the dropdown option Deleted after the Refresh option in the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Select

Documentation Type\*

Internal

Folder / Subfolder\*

Select

Name \*

Name

Role \*

Select

Is Time Based ?

No

Attached Template Form

Refresh

Active

All Records

Active

Deleted

User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
<input type="checkbox"/> Select	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="text" value="Name"/>	<input type="checkbox"/> Select	<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Employee	Internal	Professional Document	Subfolder	Certificate	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	Professional Document	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Referral	Internal		Folder	Plan of Care (485)	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	RE Plan of Care	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Employee	Internal		Folder	PC Plan of Care	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Now the Deleted folder can also be restored by using the option Active on the right side of the screen.

Edit Document Management

Save Cancel

User Type\*  
Select

Documentation Type\*  
Internal

Folder / Subfolder\*  
Select

Name\*  
Name

Role\*  
Select

Is Time Based ⓘ  
No

Attached Template Form

Refresh Deleted

	User Type	Documentation Type	Parent	Type	Name	Is Time Based	Action
<input type="checkbox"/>	Select	Select	Name	Select	Name	Select	Search Reset
<input type="checkbox"/>	Referral	External		Folder	Patient Test Report	No	<input checked="" type="checkbox"/> Active

Showing 1 to 1 of 1 records

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